

## Employment Plan Screen

### Case Note Tab

MontanaWORKS [Test] - Employment Plan

File Edit Navigation Options Utility Window Help

Employment Plan - ERIK W SIMONSON(999-06-1558) | Joe Strelnek (406)494-0329

Enrollment Appropriateness Employment Plan Progress Funding Closures Case Notes

Note Dt	Subject	Staff
<input type="checkbox"/>		Suzanne Ferguson
<input type="checkbox"/>		
<input type="checkbox"/>		
<input type="checkbox"/>		
<input type="checkbox"/>		
<input type="checkbox"/>		
<input type="checkbox"/>		
<input type="checkbox"/>		
<input type="checkbox"/>		
<input type="checkbox"/>		

+ Add  
- Delete

Note Text

Next Contact Date

Select All Deselect All Print Save Cancel

Record: 1/1 <OSC>

To add a case note, click on the "Case Note" tab on the **Employment Plan** screen.

## Employment Plan Screen

### Case Note Tab

MontanaWORKS {Test} - Employment Plan

File Edit Navigation Options Utility Window Help

Employment Plan - ERIK W SIMONSON(999-06-1558) | Joe Strelnik (406)494-0329

Enrollment Appropriateness Employment Plan Progress Funding Closures Case Notes

Note Dt	Subject	Staff
		Suzanne Ferguson

Note Text

Next Contact Date

Select All Deselect All Print Save Cancel

Record: 1/1 <OSC>

Double click in the "Note Dt" field or type in the date of your note.

Type a subject.

The case note text is typed in the "Note Text" field at the bottom of the screen.

**SAVE** when you are done.

## Employment Plan Screen

### Case Note Tab

MontanaWORKS {Test} - Employment Plan

File Edit Navigation Options Utility Window Help

Employment Plan - ERIK W SIMONSON(999-06-1558) | Joe Strelnik (406)494-0329

Enrollment Appropriateness Employment Plan Progress Funding Closures Case Notes

Note Dt	Subject	Staff
<input type="checkbox"/> 07/13/07	Test	Suzanne Ferguson
<input type="checkbox"/>		
<input type="checkbox"/>		
<input type="checkbox"/>		
<input type="checkbox"/>		
<input type="checkbox"/>		
<input type="checkbox"/>		
<input type="checkbox"/>		
<input type="checkbox"/>		
<input type="checkbox"/>		

+ Add  
- Delete

Note Text  
This is a test

Next Contact Date

Select All Deselect All Print Save Cancel

Record: 1/1 <OSC>

Opening http://montanaworksdev.mt.gov:9326/forms90/f90servlet;jsessionid=a107085ccec2 Trusted sites

If you put a date in the “Next Contact Date” field, and SAVE, a task will appear in your scheduler for that date.

You might want to use this as a reminder for a monthly contact.

The Notes on this screen are available for everyone who has access to the case management portion of MontanaWORKS to see. People who have access to only the Employment Service portion of MontanaWORKS will not be able to view these notes.

## Difference between notes on Note Screen Tab on the Employment Plan Screen and the notes on the Progress Tab.

**MontanaWORKS {Test} - Employment Plan**

File Edit Navigation Options Utility Window Help

Employment Plan - ERIK W SIMONSON(999-06-1558) | Joe Strelnik (406)494-0329

Enrollment Appropriateness **Employment Plan** Progress Funding Closures Case Notes

**Progress Evaluation Notes**

Date	Subject	Counselor	Flw-Dt
07/13/07	Tuition Expense	Joe Strelnik	08/13/07

Erik has been getting all his stuff together for school this Fall. We paid his Fall tuition today and the Missoula Job Service paid his power bill for July. Erik's about ready to go!

Select All Deselect All Print Add

Schools: School: [dropdown] Actual Start Date: [text]  
 Name: [text] Projected Completion: [text]  
 Training: [text] Actual Completion: [text]  
 Program: [text] Show Completed [checkbox] Add Delete

**Training Authorizations** ☐ Show All Plans

Date	Provider	Authorized	Paid	In Full
07/13/07	MSU - BOZEMAN	700.00	700.00	<input checked="" type="checkbox"/>
05/17/07	MSU BOZEMAN	1,000.00	.00	<input type="checkbox"/>
05/17/07	MSU BOZEMAN	1,000.00	.00	<input type="checkbox"/>

Totals: 2,700.00 700.00

**Support Services Authorizations**

Date	Provider	Authorized	Paid	In Full
07/13/07		75.00	75.00	<input checked="" type="checkbox"/>
05/17/07	3M PROPERTIES	300.00	200.00	<input type="checkbox"/>
05/17/07	CLIENT   CLIENT	1,000.00	1,000.00	<input checked="" type="checkbox"/>

Totals: 1,375.00 1,275.00

Save Cancel

Record: 1/1 <OSC>

### Progress Tab:

The notes put here are visible to all users on the system. They will appear on the Seeker screen . These notes would pertain to the progress of the participant through their training program.

You can see these notes on the Seeker screen, Seeker info tab.

MontanaWORKS [Test] - Seeker

File Edit Navigation Options Utility Window Help

Seeker Screen - ERIK W SIMONSON(999-06-1558) | Joe Strelnik (406)494-0329

Find Seeker Seeker Info Placement Edu/Cert Work History Other Referrals Scratch Pad Svc Referral Adv. Query

**Name and Address Information**

First Name: ERIK W Last Name: SIMONSON

Mailing Address: 123 FOREST VIEW LANE

Street Address:

City: BUTTE State: MT Zip: 59701

Phone Numbers: Home: (406)999-9999 Cell: Work: Other:

☐ Bad Address ☐ Bad Email Email:

**Personal Information**

Date of Birth: 09/18/1969 Age: 37 Gender: M Citizen: Y

Education Status: ☐ Disabled ☐ Work Limited ☐ Displ. Homemaker ☐ Dislocated Worker ☐ Homeless

☐ Searchable ☐ Share resume ☐ Undocumented Alien

Alien Reg #: A LEP:

**Veteran Information**

Vet Status: V - Regular Service: Army

☐ Newly Separated ☐ Served in Campaign ☒ Honorable Discharge ☒ DD214 Verified

Transition: Discharge Served From: 05/01/1988 Served To: 05/01/1992

Source: Joe Strelnik ☐ Secondary Staff

**Seeker Status**

Status: Active Date: 05/16/07 Update: 07/13/07 Last Contact: 07/13/07

Emp Exchange: Active Case Management: Active UI Last Continued Claim: Inactive

Next Appt: Time: Next Task: 08/13/07

**Current Enrollment:** WIA Dislocated Worker WIA Adult

**Services Provided**

Date	Type of Service	Staff Assigned
07/13/07	Vet Referred To WIA Training	Suzanne Ferguson
07/13/07	Placed in WIA Training	Suzanne Ferguson
07/13/07	Career Guidance	Suzanne Ferguson
07/13/07	Placed in Training	Joe Strelnik

Save Cancel

Seeker's first name  
Record: 1/1 <OSC>

The notes from the "Progress Tab" show up on the right side of the screen with the icon that looks like file folders stacked up in a row.

Click on the icon to see the notes.

